

# Creating and managing groups

This article applies to:

[Pro](#)

[Max](#)

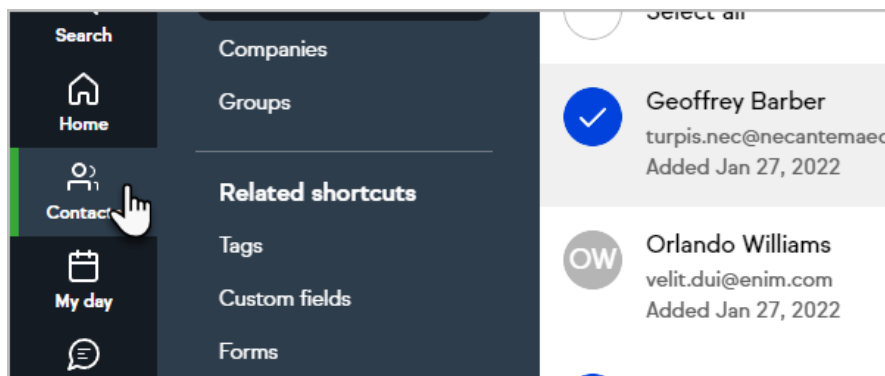
Contact lists are a helpful and useful tool to target a segment of your contacts for communication or other action. Using specific criteria, you can filter your contacts or create a List, which will allow you to quickly take action (i.e. "Potential leads" - follow up, sending email, etc.)

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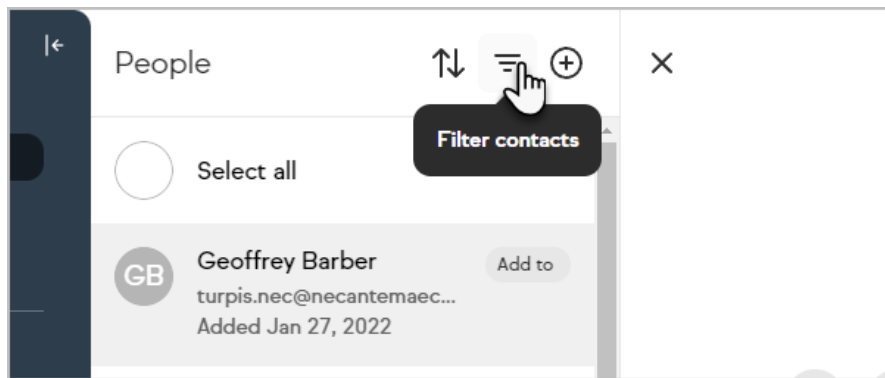
## Filter contacts

You can filter contact based on nearly any piece of the contact record including contact fields, custom fields, tags, or even phone type.

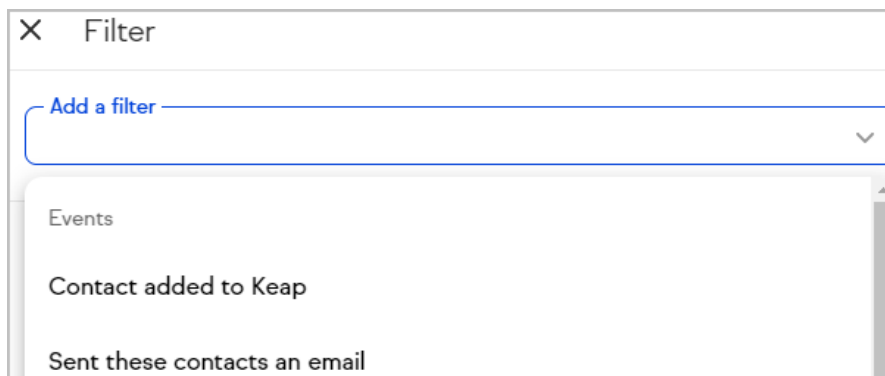
1. Navigate to your **Contacts**



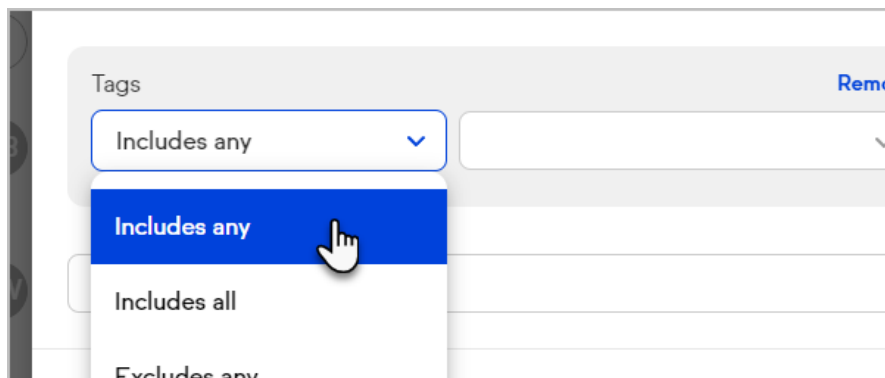
2. Click on the **Filter** button



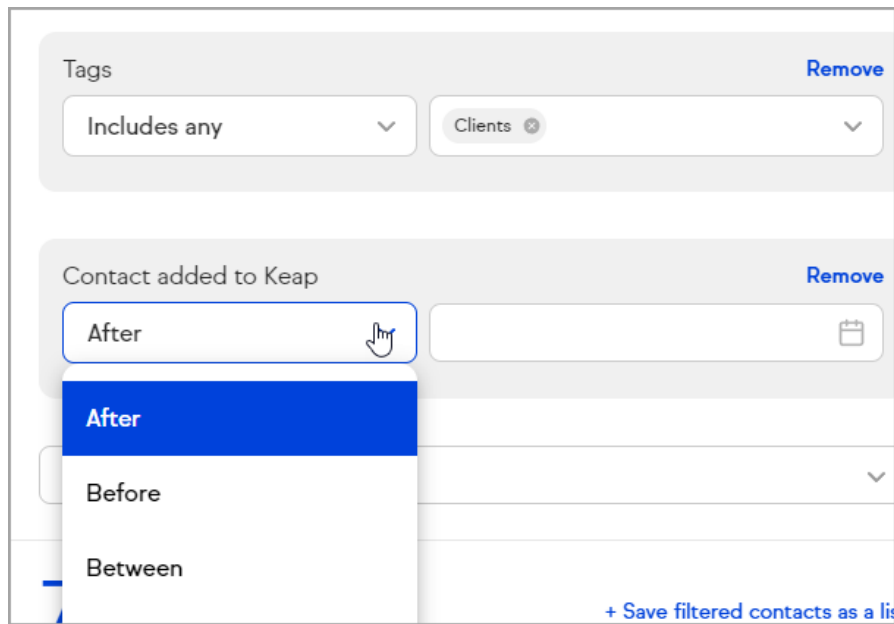
3. Click the **Add a filter** drop-down, and select a filter from the the drop down menu. Filters can be events, tags, or fields from the contact record



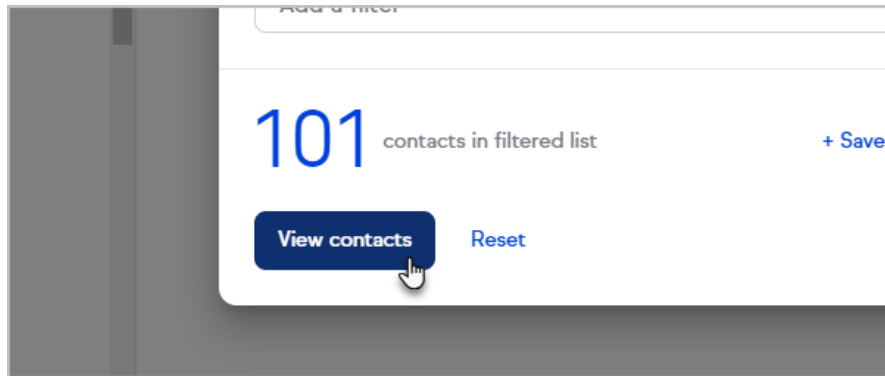
4. Many filter include additional criteria allowing you to include or exclude criteria.



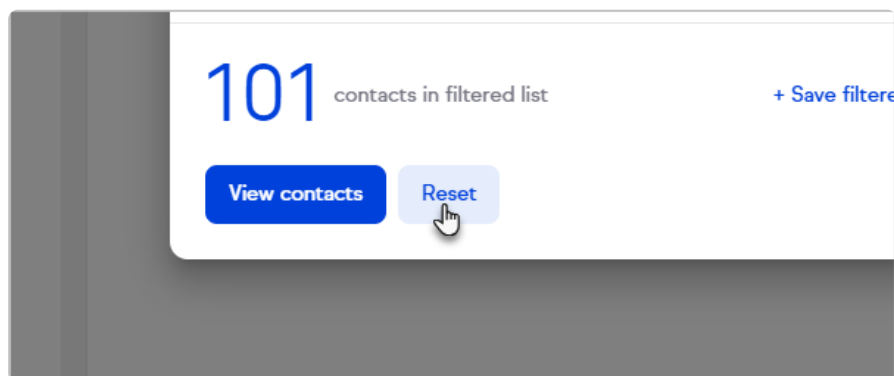
5. You can stack criteria as needed for precise list creation.



6. Click the **View contacts** button to see the list of contacts that match the criteria



7. To adjust or remove your filter, click the **Filter** button and click the **Reset** button



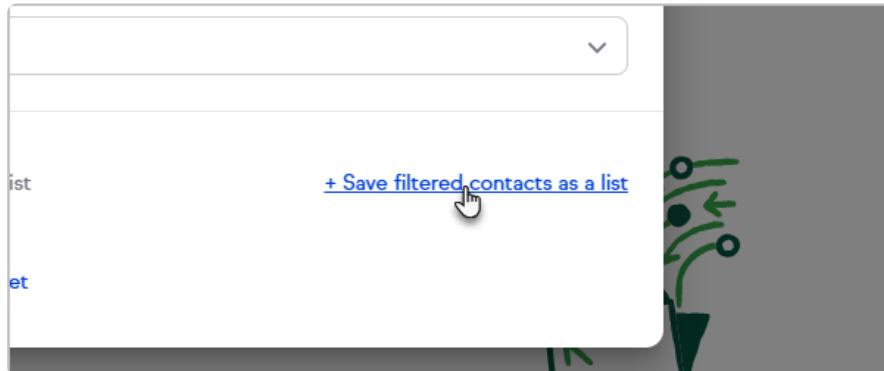
**Pro-Tip!** In Filters you can use multiple criteria in the same filter by separating with a comma. Example: Email filter that contains Keep or Gmail, use the email filter contains> "keep, gmail"

## Create a contact group

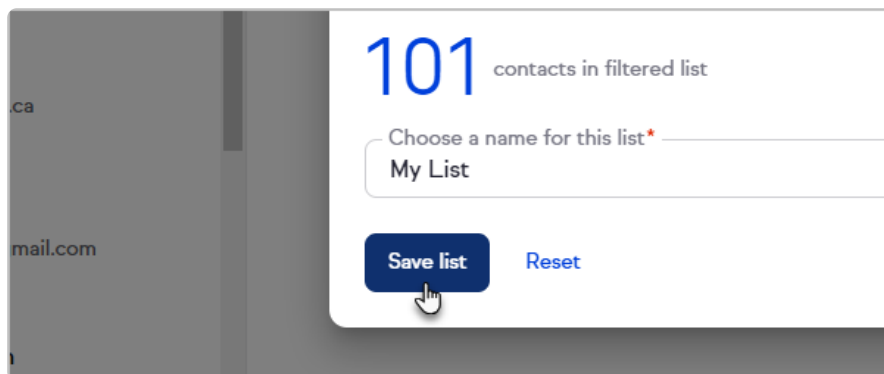


**Pro Tip!** Saved contact groups are updated in real time to include contacts that meet the criteria set in your filters. A contact may also be removed from the saved contact list if the contact no longer meets the criteria set in your filters.

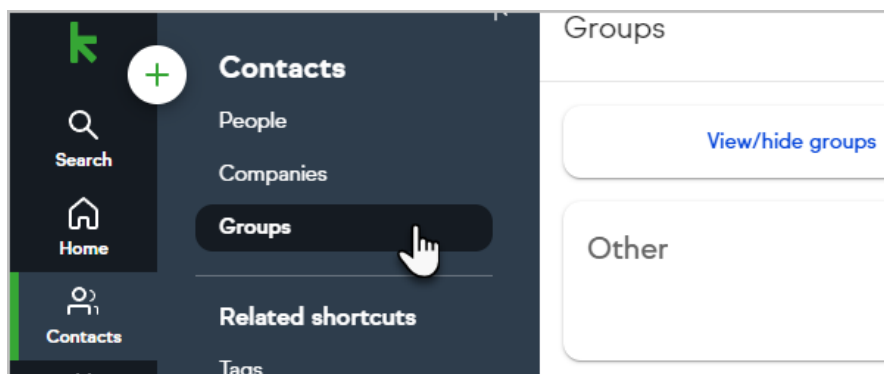
1. Enter criteria to **filter** your contacts
2. Click on the **Save filtered contacts as a list**



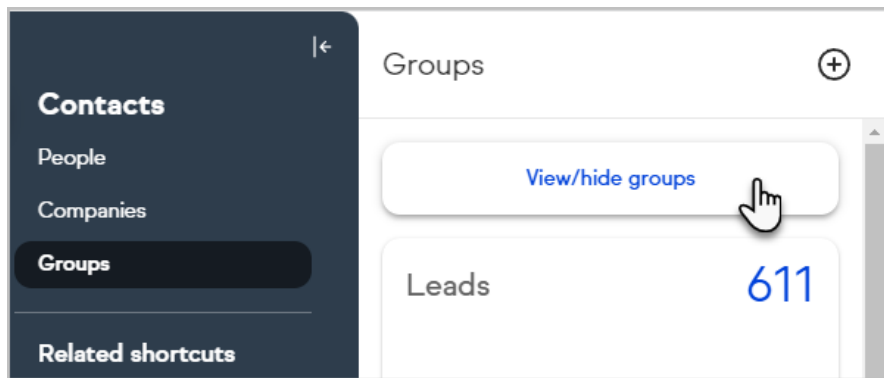
3. Enter a name and click **Save**



4. The new list will be added to your **Contact groups**

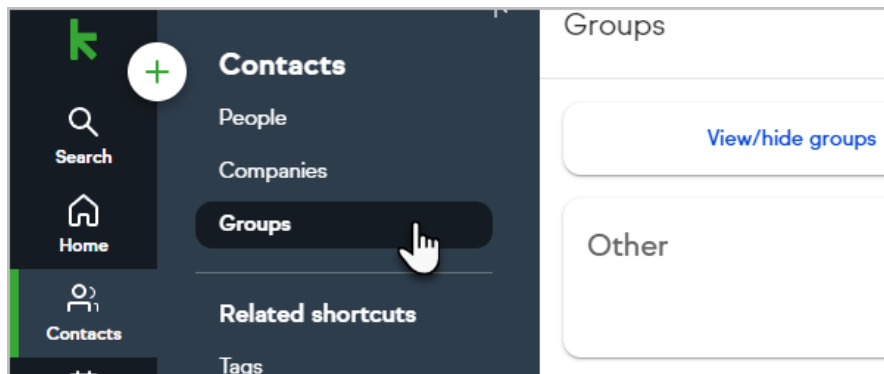


5. Click **View/hide groups** to view all of your groups, and toggle visibility of groups.

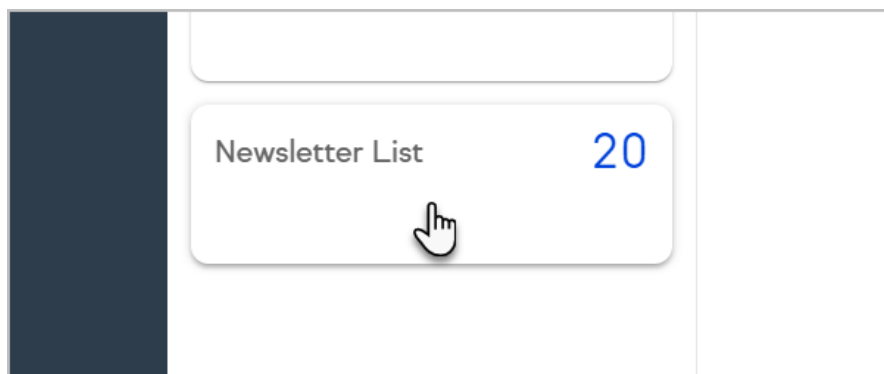


## Update a saved contact group

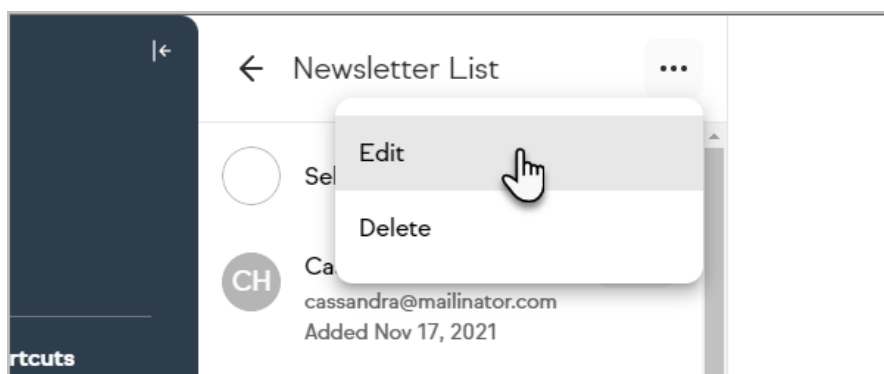
1. Navigate to **Contacts > Groups**



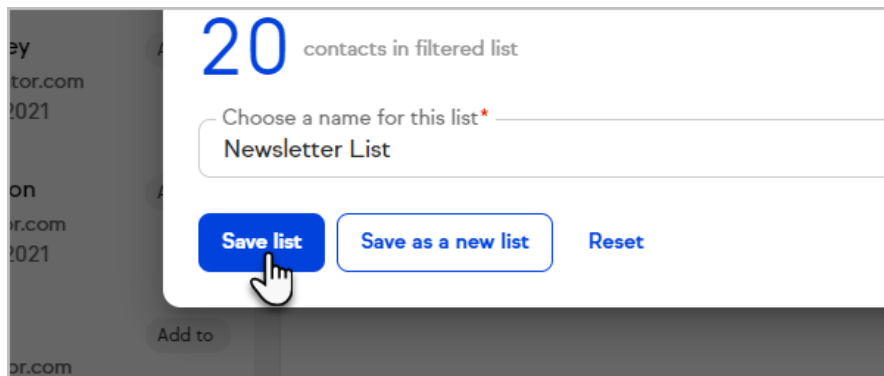
2. Select a group



3. Click the **ellipses** button and choose **Edit**



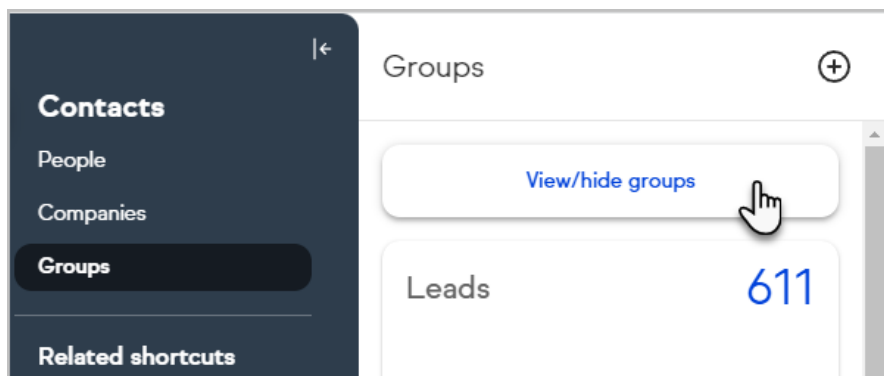
4. Adjust the criteria and click **Save list** or **Save as a new list**



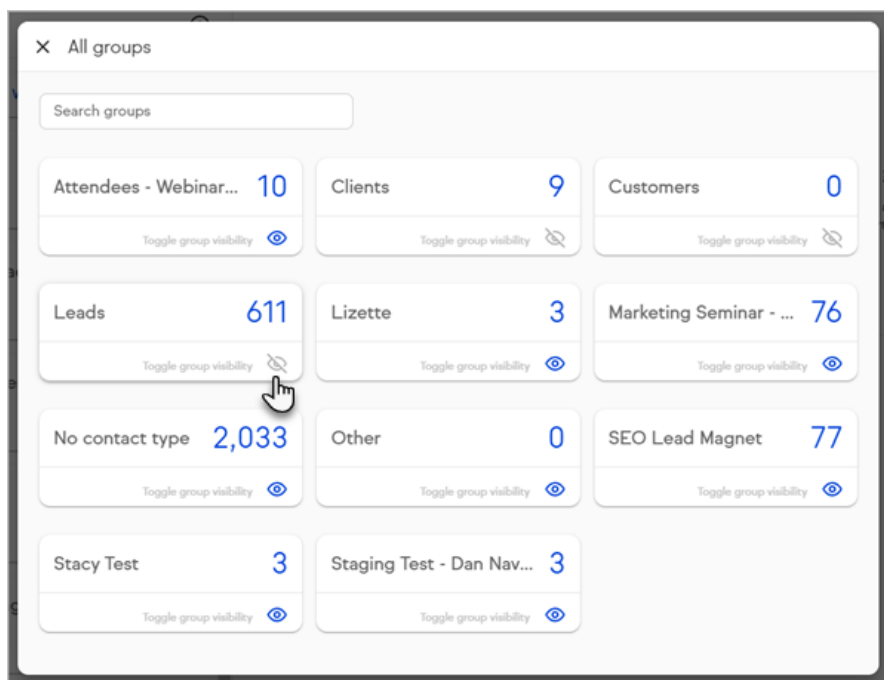
## View/Hide Groups

Have a more efficient workflow and less cluttered workspace with the ability to hide Contact groups that you don't use very often.

1. Click the **View/hide groups** button at the top of the groups list



2. Select which groups you want to show or hide in your view

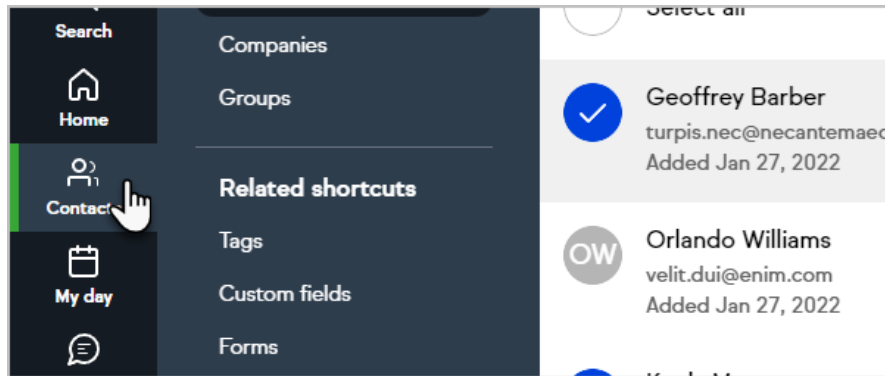


## Sort contacts

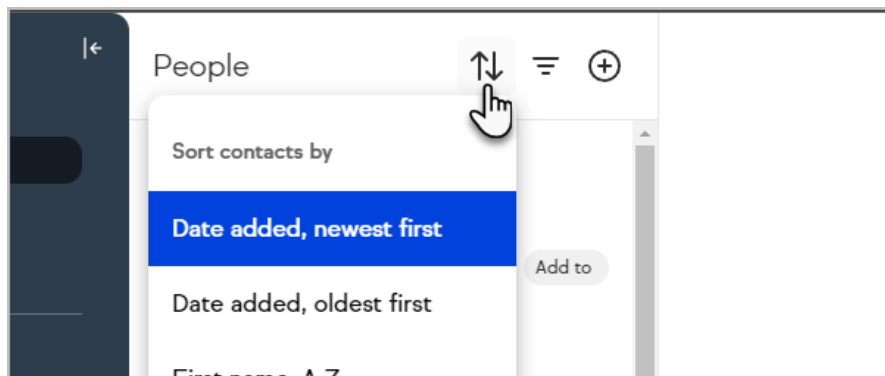
By default your contacts are sorted by date added, newest first. You can change

this with the sort button on your all contacts tab or when viewing the contacts associated with a company. After you log out, your contacts will return to being sorted by date added, newest first.

1. Navigate to your **Contacts**



2. Click the **Sort** button

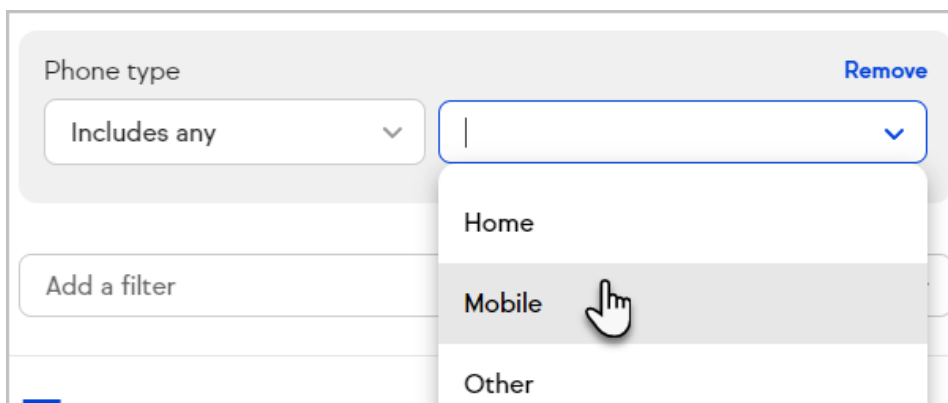


3. Select an option to sort your contact list

## Find contacts by Phone type

Filtering by Phone type can be very useful when creating a saved list to target in your text message broadcast or automated text message

You could have a contact's number marked as "Work", when it is, in fact, a text capable number (on a mobile network). Or you may have text capable numbers classified as "Other" from a contact import from another system. This filter allows you to target those contacts so you can update their phone number type for accurate classification or communication.

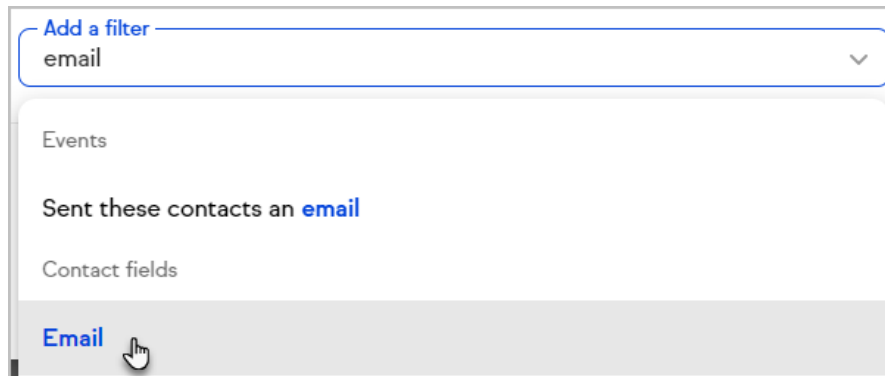


## Find contacts without information

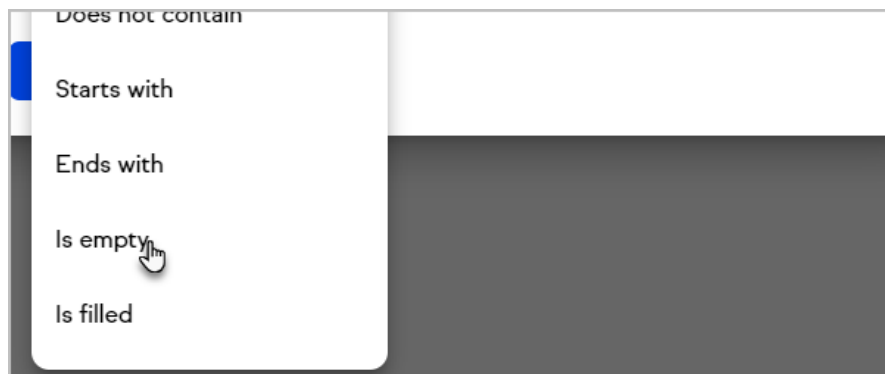
You can create a filter to find contacts that are missing information, such as a phone number or email address.

When using the filter for email, phone, or fax fields, Keap will search all standard types (work, personal, other, mobile), but does not search any custom fields that are a phone or email type. Custom phone and email fields can be filtered by "is empty" or "is filled" individually.

1. Create a filter
2. Add a field to the filter



3. Select **Is empty**



4. Click **View contacts** to see a list of contacts where the field is empty or save the filter as a list

